Quick Start

This Quick Start Guide provides a clear overview of the essential tools, systems, and platforms you will use daily. Each system supports your efficiency, professionalism, and compliance with Company and Connecticut real estate requirements.

Mastering these systems is essential for your success as a List n Show™ Agent. Consistent use of these tools will help you operate efficiently, serve clients professionally, and maintain full compliance with Company and Connecticut real estate standards.

1. POLICIES & PROCEDURES

Purpose

The Policy & Procedure Manual establishes the Company's operational standards and compliance expectations. It outlines the required processes for listings, buyer transactions, documentation, marketing, and professional conduct.

How to Access: From the RBO dashboard, or;  **listnshow.com/policies**

Important: Review the manual regularly. Updates may occur at any time without prior notice.

2. REALTY BACK OFFICE (RBO)

Overview

Realty Back Office (RBO) is the Company's primary system for:

- Transaction and document management
- Compliance tracking
- E-signatures
- Training resources
- CRM functions

All agents must create and maintain every transaction file through RBO.

Getting Started

- Watch for an email invitation to join RBO.
- Your email address will be your username.
- Create your password during the setup process.
- Bookmark the login page for easy access.

Key Features

Dashboard

Your main hub for active transactions, tasks, alerts, and reminders.

Training & Support (Top-Right Corner)

- Visit **Agent University** for onboarding materials, training videos, and support resources.
- Review tutorials on forms, contracts, compliance, CRM usage, and more.

Working Documents & E-Sign Page

- Access the full Company forms library.
- Prepare, send, and execute documents electronically.
- Ensure all signed documents are uploaded to the appropriate transaction file.

Copyright © 2026 List n Show IP LLC

3. CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

Overview

The CRM built into RBO serves as your digital contact manager. It helps you track, engage, and follow up with clients, leads, past clients, and referral sources.

Using Your CRM

- Click the **"People"** tab in RBO.
- Add and categorize contacts by client type, stage, or activity.
- Log all communication, notes, follow-ups, and key dates.
- Use built-in reminders to stay ahead on prospecting and client care.

Training Support

Open **Agent University** in RBO and view the CRM tutorials for guidance on:

- Creating and organizing contacts
- Setting automated reminders
- Linking contacts to active transactions

4. TRANSACTION MANAGEMENT

Overview

All transaction documentation and compliance processes must be completed through RBO. Each transaction requires specific forms and uploads based on Company policy.

Creating a New Transaction

1. Log into RBO.
2. Select **Transaction** from menu bar in the upper left, then click the **"Add Transaction" button.**
3. Select Agent (you). Start typing your name, then select
4. Type in transaction address
5. Select **Transaction Type** and **Agent Role** in the dialogue box dropdown and **save**.
6. Complete all required fields that will now appear in the dialog box and save.
7. Now select the newly created transaction; complete the information in the **"Details"** tab and **save.**
8. RBO automatically generates a tailored task list on the right side of your screen.
9. Complete each task to maintain compliance and track progress.

5. SMARTMLS (MULTIPLE LISTING SERVICE)

Overview

SmartMLS is the official MLS used by Connecticut real estate professionals. It provides listing data, market statistics, reports, and marketing tools essential to your business.

How to Access Training & Resources

- Log into your SmartMLS dashboard.
- Click **"Training"** under the **Smart Agent Options.**
- Explore available resources, including:
    - Video tutorials
    - Live training calendars
    - Downloadable guides and quick-reference materials

Recommendation

Copyright © 2026 List n Show IP LLC

Quick Start

All new agents should complete the SmartMLS onboarding courses to become proficient with searches, data entry, CMAs, and MLS rules.

Need Assistance?

If you require help accessing or navigating any Company systems:

- Contact the Broker.
- You may also submit a support ticket directly through the **Help** or **Training** tabs in RBO.

6. COMPANY GUIDES & CHECKLISTS

How to Access: From the RBO dashboard, or:  **listnshow.com/guides**

Foundations

- Quick Start
- Policies
- CRM & RBO Fundamentals

Business Development

- Lead Generation Systems
- Sphere of Influence
- Technology, CRM & Marketing Systems
- Open Houses & Buyer Conversion

Transaction Representation

- The Listing Process
- The Buyer Process
- Contracts, Forms & Risk Management
- Transaction Coordination & RBO

Trusted Advisor Skills

- Pricing, CMA & Seller Counseling
- Negotiation Mastery

Career Development

- Professionalism, Ethics & Career Development
- Lead Generation, Sphere of Influence & Client Relationships

Checklists

- Listing Process Checklist
- Showing Process Checklist
- Leasing Process Procedure

Copyright © 2026 List n Show IP LLC